

RECORDS RETENTION AND DISPOSAL SCHEDULE

Montgomery County Government, Dept. of Facilities & Services, Property Services Division

AGENCY		DIVISION
Item No.	Description	Retention
1.	<u>Property Services General Subject Files</u> Includes correspondence, memos, reports, and data concerning activities and responsibilities of the Division of Property Services.	Retain for two (2) years in office and three (3) years in County Records Center for a total of five (5) years, then destroy.
2.	<u>Property Services Budget Records</u> Includes final approved budget documents and expenditure account files by pseudo code number.	Retain for two (2) years in office and three (3) years in County Records Center for a total of five (5) years, then destroy.
3.	<u>Property Services Division Personnel Records</u> <u>3(a) Individual Employee Files</u> Operating records necessary for program level operations (as per Appendix to Chapter 33, Article II, Merit System of Montgomery County Code 1972, as amended). Under the Montgomery County Personnel Regulations, Sections 2.3(2) and 2.3(3), the following documents are to be retained in these files for a period of two (2) years only: Copy of Leave Record; Copy of periodic performance evaluations including supporting documentation; Copy of commendations, reprimands and disciplinary actions.	Except for items specifically exempted under the County code (see Description), retain in office until termination or transfer of employee; retain thereafter for two (2) years in office and three (3) years in County Records Center, for a total of five (5) years, then destroy.

Schedule approved by Department, Agency or Division Representative

D. D. Carter - Chief Clerk *Chief Clerk* *29/1984*
Signature Title Date

Schedule Approved by County Records Center
Department of Facilities and Services
Division of Space and Leasing Management

Schedule Authorized by Hall of Records Commission

11-29-84 *Robert C. Wynn* *Prop. Mgr.*
Date Signature Title

1/29/85 *Shirley Lynn*
Date State Archivist

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(CONTINUATION SHEET)

SCHEDULE

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Item No.	Description	Retention
	<p>Personnel Regulations require that employee records be reviewed periodically to assure that all of the above-mentioned copies are retained for two (2) years only and then are removed and destroyed.</p> <p>3(b) <u>Personnel General Files</u> - all correspondence and memos of general nature concerning personnel.</p> <p>The above personnel records are maintained for administrative convenience of the Division.</p>	<p>Retain for two (2) years in office and three (3) years in County Records Center, for a total of five (5) years, then destroy.</p>
4.	<p><u>Property Services Contracts</u></p> <p>All Lump-sum and time-and-materials contracts administered by the Division of Property Services, including all documents and correspondence relating to each contract.</p>	<p>Retain in office until contract is terminated, and thereafter in office for two (2) years and in County Records Center for eight (8) years for a total of ten (10) years, then destroy.</p>
5.	<p><u>Property Services Chronological Files</u></p> <p>Chronological file of copies of all outgoing correspondence, maintained for administrative convenience.</p>	<p>Non-Record Material May be disposed of when no longer useful.</p>